

# Memorandum

TO : Records Controll Officer/MS

DATE: 13 August 1964

FROM :

SUBJECT: Changes in Records Control Schedule for the  
Assessment and Evaluation Staff.

I have reviewed the AES Records Control Schedule and would like to make the following revisions:

Item No. 4

This was true from 1947 to 1963. Beginning in 1963 all Assessment Source Files prior to 1960 were transferred to Records Center. Therefore, the present Disposition Instructions should be, "Temporary. Disposal not authorized. Retain in current files for three years and then transfer to Records Center."

Item No. 15

✓ The last part of the Files Identification should say, "General Applicants and JOF's are filed separately through fiscal year 1961. Beginning with fiscal year 1962 they are filed together."

✓ Item No. 19

The Management Course In-Basket Materials were returned to us in January of this year and we destroyed them. This whole item should be deleted from the schedule.

✓ Item No. 23

We no longer test Clerical Applicants. This has been taken over by OTR. The item should be deleted from the schedule.

Item No. 25

✓ From March 1961 to date the Professional answer sheets have been filed in the individual's applicant or contact file. Thus under Disposition Instructions all prior to March 1961 would have been destroyed by now and all those past that date would be "Temporary. Disposal not authorized."

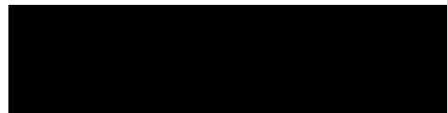
25a Deleted from schedule. 17 Aug 64

STATINTL

-2-

My suggestions for Items 4 and 15 have been in effect for over a year; evidently the Schedule was never changed to reflect this fact.

I am attaching the Records Retirement Request we sent to you previously. Would you please obtain a "Job No." for us as soon as possible, since we have some 23 boxes packed and ready for transfer.



Attachments (2)  
Also Records Retirement Request  
for Source Files.

STATINTL

25X1C

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**Next 3 Page(s) In Document Exempt**

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RECORDS CONTROL SCHEDULE		SCHEDULE NO. 35-62	
OFFICE, DIVISION, BRANCH		CONCURRENCE	
MEDICAL STAFF ASSESSMENT AND EVALUATION STAFF RESEARCH AND TESTING BRANCH/ADMIN SECTION		SIGNATURE	DATE
ITEM NO.	FILES IDENTIFICATION (TITLE, DESCRIPTION, ARRANGEMENT, AND INCLUSIVE DATES)	VOLUME (CUBIC FT.)	DISPOSITION INSTRUCTIONS
9 (93)	BRANCH SUBJECT FILE  This file consists of correspondence, memoranda and related form records pertaining to the administration and operation of the Branch. The file contains material on training schedules, weekly and monthly reports, catalogs of courses, and security. Filed alphabetically by subject. (1955 to date)	4.0	Temporary. Destroy when 5 years old. Cut off at end of fiscal year, retain in current files area for two years. Review at the end of two years and send materials to be further retained to Records Center.
10 (75)	REFERENCE PUBLICATIONS FILE  Copies of Agency, OTR, and A&E regulations notices, and memoranda. Used for reference purposes. Filed numerically.	1.0	Temporary. Destroy when superseded or obsolete.
11 (74)	COURIER RECEIPT FILE  This file consists of Courier Receipts used for transmitting classified material to other elements of the Agency. Filed numerically by receipt number.	0.1	Temporary. Destroy when 1 year old. Cut off at end of each calendar year; retain in current files area for 1 year and then destroy.
12 (123)	LIBRARY MATERIAL  Consists of a collection of library books maintained for the use of the A&E Staff. The books are concerned with various aspects of the field of psychology with such subjects as educational psychology, industrial psychology, testing techniques, measurement, statistics, and other related subjects. Filed alphabeti-	100.0	Temporary. Return to OCR Library when no longer needed.

SECRET

SECRET

ITEM NO.	FILES IDENTIFICATION	VOLUME	DISPOSITION INSTRUCTIONS
12.	LIBRARY MATERIAL (Cont'd)	<b>SECRET</b>	
	cally by author within subject matter groups.		
13.	PUBLICATIONS		
(121)	<p>Publications, periodicals, magazines, and pamphlets, unclassified and classified, maintained for the use of the A&amp;E Staff. They include professional journals published by psychological and statistical societies, research reports issued by colleges and universities, and reports issued by other government agencies and contractors. Filed alphabetically by title or subject.</p>	75.0	Temporary. Return to OCR Library or destroy when no longer needed.
14.	MASTER RECORD CARD FILE		
(77)	<p>Testing Record (Form 428) (5x8 cards) containing the record of all individuals who have taken any of the A&amp;E professional test batteries or have been assessed. Used as a ready reference and index to Test Battery cards. Filed alphabetically by surname. (1946-to-date)</p>	5.0	Temporary. Disposal not authorized. Retain in current files area indefinitely.
15.	PROFESSIONAL APPLICANT FILE		
(81)	<p>This file contains individual folders for all professional applicants tested by and for A&amp;E. The folders contain the test results and reports on the applicants. Filed alphabetically by surname for each fiscal year. General applicants and JOT's are filed separately. <i>From FY 62 - maintained in one file.</i></p> <p>a. General</p> <p>b. JOT</p> <p><i>per 13 Aug 64 memo R.D. 8/17/64</i></p>	22.0	Temporary. Destroy when 5 years old. Successful applicants are transferred to Contact Files. Cut off unsuccessful applicants' folders each year; retain 2 years in current files area, then retire to Records Center.
		<b>SECRET</b>	

RECORDS CONTROL SCHEDULE			SECRET	
OFFICE, DIVISION, BRANCH			SCHEDULE NO.	
MEDICAL STAFF ASSESSMENT AND EVALUATION STAFF RESEARCH AND TESTING BRANCH/RESEARCH SECTION			35-62	
			CONCURRENCE	
			SIGNATURE	
			TITLE	
			DATE	
ITEM NO.	FILES IDENTIFICATION (TITLE, DESCRIPTION, ARRANGEMENT, AND INCLUSIVE DATES)	VOLUME (CUBIC FT.)	DISPOSITION INSTRUCTIONS	
16	IBM CARD FILES	0.2	Temporary. Destroy when no longer needed.	
(99)	a. <u>Training Evaluation Card File.</u>			
(101)	IBM cards which contain the training evaluation of any individual who has completed any of the courses sponsored by OTR. (1955 to present)			
	b. <u>Work Card File.</u> IBM cards collected and maintained by the Branch and used to supply statistical information required by the Staff. Filed numerically by code number. (1953 to March 1961)	1.0	Temporary. Destroy when no longer needed.	
17	TEST TAPE FILE (Paper and Magnetic)	1.2	Temporary. Magnetic: Disposal not authorized. Paper: Hold for 6 months in current files area, then destroy when converted to magnetic tape.	
(new)	Information for each person tested on the professional testing batteries is retained on 501 tapes. Information included: name, grade, education, date of birth, assignment, date of testing, scores on each test taken, responses to certain tests. Punched in numerical order for each battery. (1961 to date)			
18	PROJECT AND STUDY FILE	2.0	Temporary. Disposition not authorized. Retain in current files area indefinitely.	
(76)	a. <u>Project file.</u> This file is maintained on all projects performed by the Research and Testing Branch. It consists of the permanent copies of the memorandum approving the project, the project plan, and the final report. Filed numerically by project number.			
(94)				

ITEM NO.

PROJECT AND STUDY FILE (CONT'D)

b. Work File. This file consists of correspondence, reports, tabulations, and work papers related to various projects and studies conducted by the Branch. The material in this file is the source material for research performed on various tests, evaluations, and performance predictions. Filed by assigned number of subject for each fiscal year.

(1951 to date)

19. ~~MANAGEMENT COURSE IN-BASKET MATERIALS~~

(new)

Completed "In-Basket Test" Materials from management training courses. This material is retained for research purposes. Filed alphabetically by surname for each Management Course.

(1958 to present)

20.

(new)



(1959 to present)

SECRET

16.

Temporary. At the end of each fiscal year, retire to the Records Center folders no longer of current interest. After five years return to Staff for final disposition.

9.

Temporary. Ship to Records Center in box-lots; hold for one year then return to the Staff for review and final disposition.

30.

Temporary. Retire to Records Center in box-lots to be held for research purposes. After five years return to the Staff for final disposition.

SECRET

FILES IDENTIFICATION

VOLUME

DISPOSITION INSTRUCTIONS

SECRET

ITEM NO.

21 .

## SAMPLE TEST UNIT

(103)  
(104)

a. Sample Test File. Sample copies of commercial and Agency developed tests of intellectual ability, language aptitude, personality and temperament, and clerical skills. These tests are used for research and possible inclusion in A&E Test Batteries. Filed alphabetically by subject.

b. Index Filed. 5x8 cards used to locate commercial tests in the Sample Test Unit. Filed alphabetically by type of test.

18.0

Temporary. Destroy when no longer needed for research.

0.4

Temporary. Destroy when tests are destroyed.

SECRET

## RECORDS CONTROL SCHEDULE

**SECRET**

35-62

CONCURRENCE

OFFICE, DIVISION, BRANCH

MEDICAL  
ASSESSMENT AND EVALUATION STAFF  
RESEARCH AND TESTING BRANCH/TESTING SECTION

SIGNATURE

TITLE

DATE

DISPOSITION INSTRUCTIONS

ITEM NO.	FILES IDENTIFICATION (TITLE, DESCRIPTION, ARRANGEMENT, AND INCLUSIVE DATES)	VOLUME (CUBIC FT.)	DISPOSITION INSTRUCTIONS
22. (105)	ADMINISTRATIVE TEST MATERIALS  The file consists of correspondence and manuals relating to the testing batteries given by the Testing Section. Included are the professional and clerical applicant and employee batteries, IOC Waiver Test, foreign language aptitude Test battery, and the FODP battery. Filed alphabetically by subject. (1956 to date)	2.5	Temporary. Destroy when obsolete, superseded or revised.
23. (112)	TEST ADMINISTRATORS' SCHEDULES  This file consists of the records maintained by the Test Administrators on all clerical applicants tested at Headquarters. This is the only record of Headquarters tested applicants. The material includes: name, projected job assignment, test scores, and other related information. (1957 to date)	2.5	Temporary. Destroy when 5 years old. Cut off at end of each fiscal year, hold for 5 years, and then destroy.
24. (91)	BATTERY CARD FILE  a. Professional. A file of 5x8 cards used to record the test scores for each individual tested on professional batteries for or by A&E. Other information includes name, education, Agency component, and grade level of the individual. Filed numerically by fiscal year for the separate batteries. (1953 to date)	5.0	Temporary. Disposal not authorized. Retain in current files area indefinitely.

**SECRET**

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## RECORDS MANAGEMENT PROGRAM

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# RECORDS CONTROL SCHEDULE FOR THE

DDS/OFFICE OF MEDICAL SERVICES

